

## **PARTICIPANT INQUIRY**

Participant Inquiry (PI) is an inquiry-only function that contains Participant information extracted nightly from the CalPERS Health and Membership Database (COMET). This section is written for Carriers and Employers who use ACES to access information about Participants in a CalPERS Health and/or Retirement program.

### **Security Rules for Employers**

Employers can access information as follows:

- Only the current Employer can view a Participant's Health and Membership record
- Only the Employer from whom the Participant retired can view a Retiree's Health and Membership enrollment record

### **Security Rules for Carriers**

Carriers can access information as follows:

- Only the current Carrier can view all enrollment information
- All other Carriers do not have access to address or dependent information for any enrollee who is not currently enrolled with them

NOTE: All other Carriers include, but are not limited to, a Carrier that previously provided health coverage for the Participant.

In implementing these rules, Participant Inquiry may not display all data. Keep these rules in mind if the user gets unexpected query results.

### Participant Inquiry Features

#### As Of Date

The As Of Date determines the information that the system displays. The As Of Date defaults to today's date; however, data can also be retrieved "As Of" a different date (e.g., future or past dates.) When the As Of Date is changed, the ONLY information that will change is in the Subscriber and Dependent tabs. This function works only if the current user is the current employer (or was the employer as of the date provided).

NOTE: Changing the As Of Date will not give the user Address or Dependent information unless the user is the current Carrier or Employer "As Of" the System Default Date.

Example: Does a dependent have coverage during August 6, 1999?

- Select the value in the "As Of Date" field's data-entry box so it's highlighted
- Change the As Of Date to 08/06/1999 (mm/dd/yyyy)
- Click **Get Data**
- Click the Dependent Tab and the system will show you if that dependent was covered "As Of" the changed date

#### Extract Date/Time field (located above the "Clear" button)

The "Extract Date/Time" is the day and time that data was *applied* to ACES from COMET. The information being viewed is typically the data from the last business day. For example, if logging in on June 8, the data you see was updated on COMET on June 7. If a batch was submitted on a business day by the batch deadline, the Successfully Applied transactions will be viewable the following day.

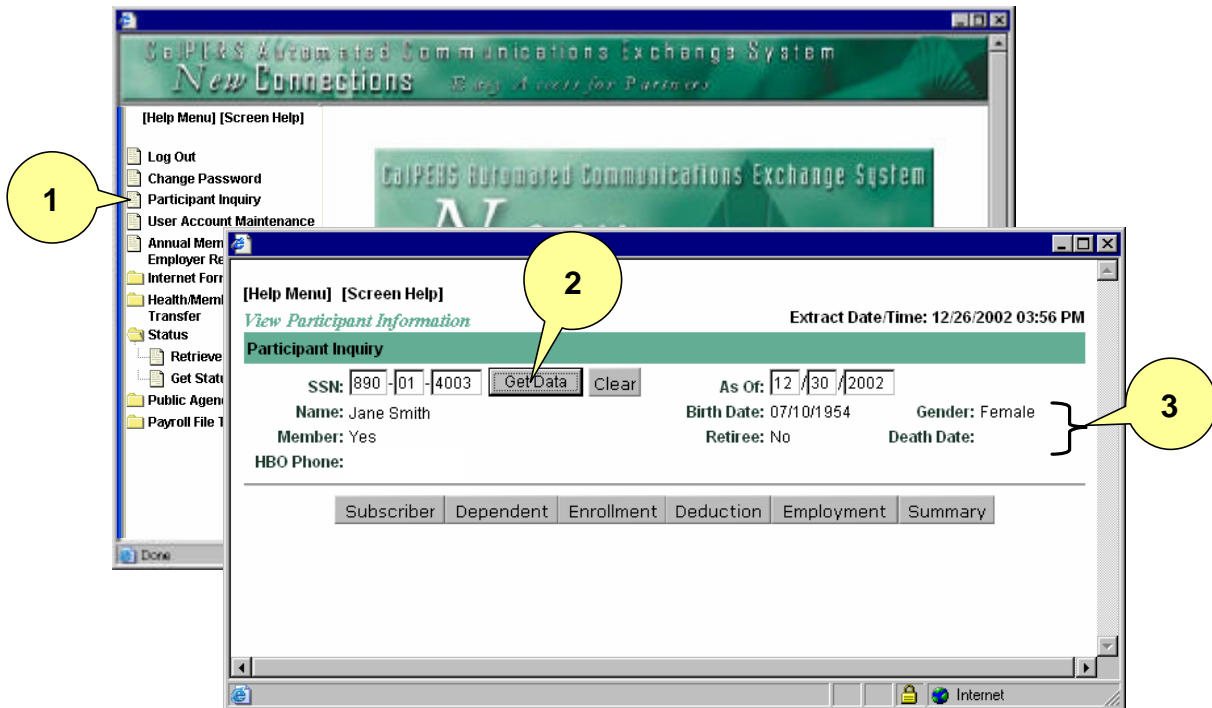
#### Notes Feature

**General Notes** – CalPERS staff have the ability to save notes to an employer, a health carrier, or internal staff. If a note was saved for a Participant, a **Notes** button will show in the header of **Participant Inquiry**. Click on the **Notes** button to open a window that will display the note.

**Notice 28 Notes** – A Notice 28 is information that is sent to the employee about the change they are requesting. These notices are system generated. CalPERS staff have the ability to put an additional note on these notices. In the Enrollment Tab, an icon will show in the "Proc. Status" column of a transaction line. Click on the icon and it will open the note that was printed on the Notice 28.

### Accessing Participant Inquiry

1. Click on **Participant Inquiry**. A new window will appear.
2. Enter the Participant's SSN and click **Get Data**.
3. ACES will populate the View Participant Information screen with information in the Header: **Name, Birth Date, Gender, Member, Retiree, Death Date** and **HBO Phone**.



HEADER DEFINITIONS	
FIELD NAME	DEFINITION
Name	Name of the Participant whose Social Security Number appears in the "SSN" field
Birth Date	Participant's date of birth
Gender	Participant's gender: male, female, or unknown
Member	Is the Participant a member of CalPERS retirement? Yes or No. <b>NOTE:</b> A Participant who has retired or received a refund of contributions is no longer considered a member of CalPERS retirement.
Retiree	Is the Participant retired from CalPERS? Yes or No
Death Date	If applicable, the death date of Participant is displayed
Extract Date/Time (top of screen)	Date when PI was last updated. For more information, see "Special Features of the System."
SSN	Participant Social Security Number
As Of Date	See "Participant Inquiry Features"

## School Employer Header Information

CalPERS - ACES - Microsoft Internet Explorer

[Help Menu] [Screen Help]

*View Participant Information* Extract Date/Time: 09/02/2005 03:00 AM

**Participant Inquiry**

SSN: 555 - 55 - 5555 Get Data Clear As Of: 09 / 02 / 2005

Name: David B Nelson Birth Date: 01/27/1974 Gender: Male

Member: No Retiree: No Death Date:

HBO Phone: (925) 682-8000 x4152

Election: None Prior School PERS Membership: No

Subscriber Dependent Enrollment Deduction Employment Summary

1 2

Additional information is populated in the Header area of **Participant Inquiry** for school employers only: **Election** and **Prior School PERS Membership**.

HEADER DEFINITIONS	
FIELD NAME	DEFINITION
Election	Will show "Yes" or "None." Used for Classified employees in PERS who receive an appointment to a Certificated position. They have a 60-day opportunity to elect to remain in PERS. "Yes" indicates they have made this election.
Prior School PERS Membership	Will indicate "Yes" if there is prior school employment with PERS membership; "No" if there is not

**Note:** 5 years service credit information unavailable at this time.

If this is the correct Participant, click on one of the tabs listed below:

TAB DEFINITIONS	
INFORMATION TABS	DEFINITION
1. Subscriber	Displays details on Employer, Enrollment and Address information for the current employer
2. Dependent	Lists the currently enrolled dependents for the selected Participant and shows additional details about each dependent including, if applicable, information on the dependent's disabled dependent certification
3. Enrollment	Displays enrollment history for the selected Participant
4. Deduction	Displays deduction history for the selected Participant
5. Employment	Displays all employment associated with Membership and/or Health enrollment history. The information displays according to agency access rights.
6. Summary	General information about Participant

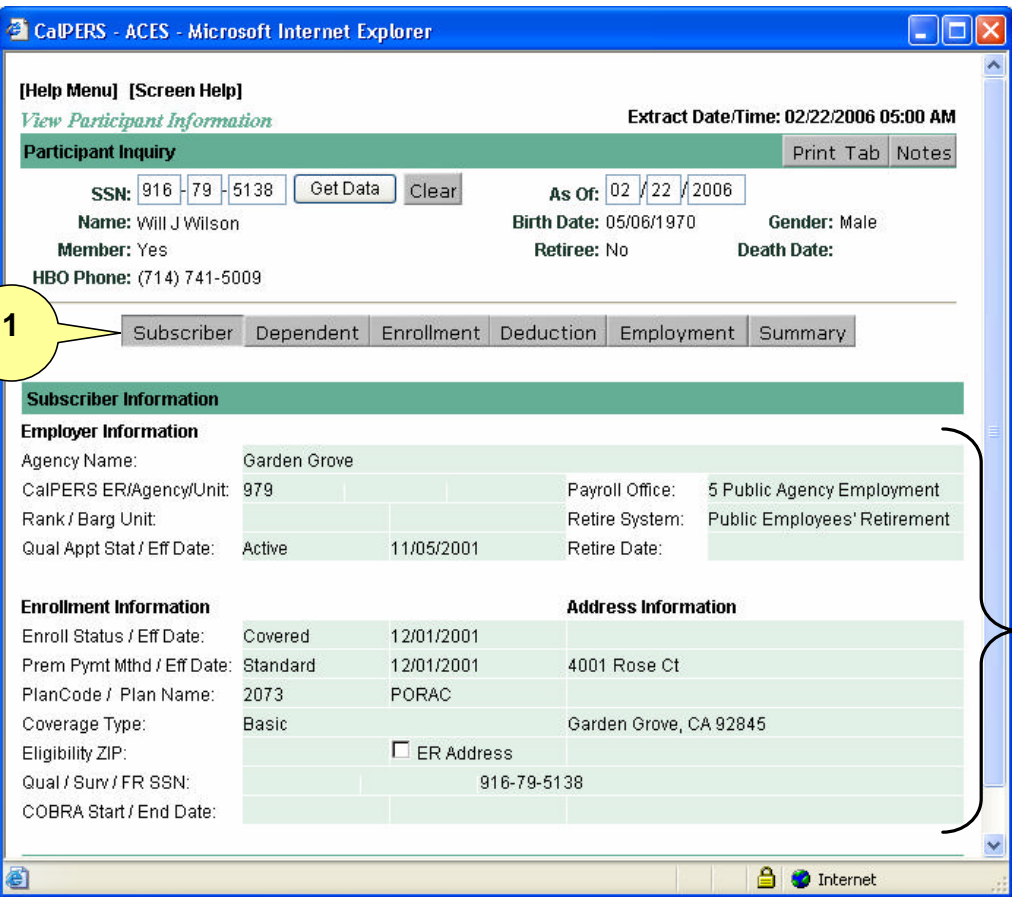
Employers who contract for Health and Membership will see tabs 1 through 6.  
 Employers who contract for Membership only will see tabs 5 and 6.  
 Health Carriers will see tabs 1 through 4.

**NOTE:**

If information on these tabs is incorrect, please contact CalPERS ERCC at  
**888 CalPERS** (or **888-225-7377**).

## 1. Subscriber Tab

The Subscriber tab displays details on the participant's employer, health enrollment, and mailing address.



CalPERS - ACES - Microsoft Internet Explorer

[Help Menu] [Screen Help]

[View Participant Information](#) Extract Date/Time: 02/22/2006 05:00 AM

**Participant Inquiry** [Print Tab](#) [Notes](#)

SSN: 916-79-5138 [Get Data](#) [Clear](#) As Of: 02/22/2006

Name: Will J Wilson Birth Date: 05/06/1970 Gender: Male

Member: Yes Retiree: No Death Date:

HBO Phone: (714) 741-5009

1 [Subscriber](#) [Dependent](#) [Enrollment](#) [Deduction](#) [Employment](#) [Summary](#)

**Subscriber Information**

**Employer Information**

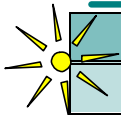
Agency Name:	Garden Grove		
CalPERS ER/Agency/Unit:	979	Payroll Office:	5 Public Agency Employment
Rank / Barg Unit:		Retire System:	Public Employees' Retirement
Qual Appt Stat / Eff Date:	Active	11/05/2001	Retire Date:

**Enrollment Information**

Enroll Status / Eff Date:	Covered	12/01/2001
Prem Pymt Mthd / Eff Date:	Standard	12/01/2001
PlanCode / Plan Name:	2073	PORAC
Coverage Type:	Basic	
Eligibility ZIP:		<input type="checkbox"/> ER Address
Qual / Surv / FR SSN:	916-79-5138	
COBRA Start / End Date:		

**Address Information**

4001 Rose Ct
Garden Grove, CA 92845



SUBSCRIBER TAB DEFINITIONS	
	Definition
Agency Name:	Name of the Participant's employer
CalPERS ER/Agency/Unit:	<p><b>State Agencies:</b>  <i>CalPERS ER</i> code is a unique number which CalPERS assigns to each Employer.  <i>Agency</i> code is the Agency code used by State Controller's Office.  <i>Unit</i> code is the Unit code used by State Controller's Office.</p> <p><b>Public Agency [School] Employers:</b>  <i>CalPERS ER</i> code is a unique number that CalPERS assigns to each Employer.  <i>Agency</i> code field is blank.  <i>Unit</i> code is a number assigned by CalPERS Public Agency Billing Unit to Health Groups for Public Agency employers.</p> <p><b>Non-Central State Agencies, Public Agency, and Non-PERS Employers:</b>  <i>CalPERS ER</i> code is a unique number that CalPERS assigns to each Employer.  <i>Agency</i> code field is not applicable (blank).  <i>Unit</i> code field is not applicable (blank).</p>
Rank/Barg. Unit:	<p><b>State Agencies:</b>  Abbreviation for Participant's Collective Bargaining <i>Rank/Unit</i> code.  Rank (Collective Bargaining Rank): Participant designation assigned to a State employee. E.g., R = Rank and File, E = Exempt, etc.  Unit (Collective Bargaining Unit): unit code assigned to a State employee. E.g., 1 = Administrative, Financial, and Staff Services, etc.</p>
Qual Appt Stat/Eff Date:	Describes status of appointment that qualified a Participant to enroll in benefits. The Effective Date is the event date that qualified Participant to enroll.
Payroll Office:	Alpha or numeric code which identifies Participant's pay entity
Retire System:	Participant's retirement system: <b>PERS, STRS, JRS, LRS, MRS, or Non-PERS</b>
Retire Date:	Participant's retirement date
Enrollment Information	Definition
Enroll Status/Eff Date:	<p>Enrollment status: <b>Covered</b> or <b>Not Covered</b>.  Effective Date is the date the current Enrollment Status was effective.</p>
Prem Pymt Mthd/Eff Date:	<p>Payment method: <b>Standard, Direct Pay</b> or <b>COBRA</b>.  Effective Date is the date the current Premium Payment Method was effective.</p>
Plan Code/Plan Name:	Health plan code/party rate and health plan name
Coverage Type:	Health coverage type for the Participant: <b>Basic</b> or <b>Medicare</b>
Eligibility Zip:	Participant's ZIP Code if different than Mailing Address
ER Address:	This box will be checked if the Eligibility ZIP Code is that of the employer
Qual/Surv/FR SSN:	<p>Qual (Qualifying SSN) = the SSN of the deceased employee/retiree OR SSN of employee/retiree from whom the COBRA enrollee qualified.  Surv (Survivor SSN) = the SSN of a deceased employee/retiree.  FR SSN (Financially Responsible SSN) = the SSN under which the premium payment for this enrollment will be made.</p>
COBRA Start/End Date:	Start and end dates of the COBRA enrollment period

## 2. Dependent Tab

The Dependent tab displays information on currently enrolled dependent(s) of the selected Participant and shows additional details about each dependent including, if applicable, information on the dependent's disabled dependent certification.

If there are multiple dependents, click on each [dependent name](#) for additional information.

CalPERS - ACES - Microsoft Internet Explorer

[Help Menu] [Screen Help]

*View Participant Information* Extract Date/Time: 02/22/2006 05:00 AM

**Participant Inquiry** Print Tab Notes

SSN: 916 - 79 - 5138 Get Data Clear As Of: 02 / 22 / 2006

Name: Will J Wilson Birth Date: 05/06/1970 Gender: Male

Member: Yes Retiree: No Death Date:

HBO Phone:

Subscriber Dependent Enrollment Deduction Employment Summary

**Dependent Information**

SSN	Name	Birth Date	Relationship	Enrl Eff Date
--	<a href="#">Willimina T Wilson</a>	06/26/2000	Child	12/01/2001
--	<a href="#">William M Wilson Jr</a>	05/05/2005	Child	06/01/2005

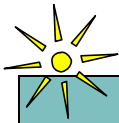
1 of 1

Gender: Female Disabled Dependent Certification Date:

Coverage Type: Basic Certification Expiration Date:

Pending Review Date:





DEPENDENT TAB DEFINITIONS	
COLUMN NAMES	DEFINITION
SSN	Dependent's Social Security Number
Name	Dependent's name
Birth Date	Dependent's date of birth
Relationship	Dependent's relationship to the Participant
Enrl Eff Date	Effective date of the Dependent's enrollment action
FIELD NAMES	DEFINITION
Gender:	The gender of the Dependent
Coverage Type:	The health coverage type for the Dependent: <b>Basic</b> or <b>Medicare</b>
Disabled Dependent Certification Date:	The initial date of the Dependent's certification as disabled. A date in this field indicates the individual has been certified to continue on the health enrollment beyond his/her 23 <sup>rd</sup> birthday.
Certification Expiration Date:	The date when the Dependent's current disabled certification expires
Pending Review Date:	A date in this field indicates the Dependent's disabled certification is under review. If the individual is not certified by this date, his/her health coverage will be terminated.

## 3. Enrollment Tab

The Enrollment tab will display details for health transactions that were processed. When there are multiple transactions, click on the [Effective Date](#) of a transaction for additional information.

A rescinded transaction is a transaction that was processed and later voided. Click on [Show Rescinded Actions](#) to display any rescinded transactions.

CalPERS - ACES - Microsoft Internet Explorer

[Help Menu] [Screen Help]

[View Participant Information](#) Extract Date/Time: 02/22/2006 05:00 AM

**Participant Inquiry** [Print Tab](#) [Notes](#)

SSN: 916-79-5138 [Get Data](#) [Clear](#) As Of: 02/22/2006

Name: Will J Wilson Birth Date: 05/06/1970 Gender: Male

Member: Yes Retiree: No Death Date:

HBO Phone:

Subscriber Dependent **Enrollment** Deduction Employment Summary

**Health Benefits and Enrollment History**

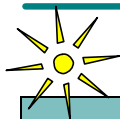
Effective Date	Category	Reason	Name	Plan Code	Proc Status
<a href="#">06/01/2005</a>	Add Dependent	200 Birth/placement	William M Wilson Jr	2073	Applied
<a href="#">10/01/2004</a>	Delete Dependent	302 Divorce	Wanda W Wilson	2072	Applied
<a href="#">01/01/2004</a>	Change Plan	400 Open Enrollment Plan Chg	Will J Wilson	2073	Applied
<a href="#">12/01/2001</a>	New Enrollment	100 Time Base & Tenure	Wanda W Wilson	2053	Applied
<a href="#">12/01/2001</a>	New Enrollment	100 Time Base & Tenure	Wilimina T Wilson	2052	Applied
<a href="#">12/01/2001</a>	New Enrollment	100 Time Base & Tenure	Will J Wilson	2051	Applied

1 of 1 [Show Rescinded Actions](#)

Reason:	Birth/placement	Premium Pymt Mthd:	Standard
Coverage Type:	Basic	HBO Received Date:	
Plan:	PORAC	Event Date:	05/05/2005
Relationship:	Child	Change Date:	08/05/2005
Birth Date:	05/05/2005	Create Date:	08/05/2005
		Username:	developer

[Effective Date](#)

[Show Rescinded Actions](#)



ENROLLMENT TAB DEFINITIONS	
HEALTH BENEFITS AND ENROLLMENT HISTORY	DEFINITION
Effective	Effective date of the selected transaction
Category	The Reason group heading used to identify the transaction reason type
Reason	The numeric code that identifies the reason for the selected transaction
Name	Name of the Participant/Dependent involved in the selected transaction
Plan Code	Health plan code/party rate that resulted from processing the selected transaction
Proc Status	Describes the updated status of the transaction (i.e. Applied or Rescinded) to the CalPERS database
<a href="#">Show Rescinded Actions</a>	A rescinded transaction is a transaction that was processed, then later voided. To see the any rescinded transactions, click <a href="#">Show Rescinded Actions</a> .
ADDITIONAL FIELDS	DEFINITION
Reason:	A detailed description of the transaction Reason Code shown in the "Reason" column for the selected transaction
Coverage Type:	The coverage type for the Dependent named in the selected transaction: <b>Basic</b> or <b>Medicare</b>
Plan:	Health plan name
Relationship:	Describes the dependent's relationship to the Participant
Birth Date:	Birth date of the Dependent named in the selected transaction
Premium Pymt Mthd:	Description of the premium payment method: <b>Standard</b> , <b>Direct Pay</b> or <b>COBRA</b>
HBO Received Date:	Date enrollment document was received in the employer's office
Event Date:	Date of the event that generated the selected transaction
Change Date:	Date the selected transaction was added or changed in the system
Create Date:	Date the selected transaction was originally added to the system. May be different from Change Date if for a rescinded transactions.
Username:	Login ID of the individual who keyed the selected enrollment transaction

## 4. Deduction Tab

The Deduction tab displays details for premiums and deduction history. Click on [Pay PD](#) for additional information if there is a retroactive money adjustment. The Coverage Start and End date will display at the bottom of the screen.

CalPERS - ACES - Microsoft Internet Explorer

[Help Menu] [Screen Help]

[View Participant Information](#) Extract Date/Time: 02/22/2006 05:00 AM

**Participant Inquiry** [Print Tab](#) [Notes](#)

SSN: 916 - 79 - 5138 [Get Data](#) [Clear](#) As Of: 02 / 22 / 2006

Name: Will J Wilson Birth Date: 05/06/1970 Gender: Male

Member: Yes Retiree: No Death Date:

HBO Phone:

Subscriber Dependent Enrollment **Deduction** Employment Summary

**Deduction History**

Agency/Unit	Pay PD	Pymnt Start	Pymnt End	Plan Code	Premium	ERShare	EEShare	Medicare	Adj
979/	<a href="#">2005/07</a>	08/01/2005	//	2073	\$950.00	\$950.00	\$0.00	\$0.00	N
979/	<a href="#">2005/06</a>	07/01/2005	//	2073	\$950.00	\$950.00	\$0.00	\$0.00	N
979/	<a href="#">2005/06</a>	07/01/2005	//	2072	-\$748.00	-\$748.00	\$0.00	\$0.00	Y
979/	<a href="#">2005/06</a>	07/01/2005	//	2073	\$950.00	\$950.00	\$0.00	\$0.00	Y
979/	<a href="#">2005/05</a>	06/01/2005	//	2072	\$748.00	\$748.00	\$0.00	\$0.00	N
979/	<a href="#">2005/04</a>	05/01/2005	//	2072	\$748.00	\$748.00	\$0.00	\$0.00	N
979/	<a href="#">2005/03</a>	04/01/2005	//	2072	\$748.00	\$748.00	\$0.00	\$0.00	N
979/	<a href="#">2005/02</a>	03/01/2005	//	2072	\$748.00	\$748.00	\$0.00	\$0.00	N
979/	<a href="#">2005/01</a>	02/01/2005	//	2072	\$748.00	\$748.00	\$0.00	\$0.00	N
979/	<a href="#">2004/12</a>	01/01/2005	//	2072	\$748.00	\$748.00	\$0.00	\$0.00	N

[Next>](#) [Last>>](#) 1 of 5

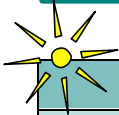
Coverage Start: 08/01/2005 Pay Entity: PA Billing

Coverage End: 08/31/2005 Premium Pymt Mthd: Standard

Health Pretax Type:

[Pay PD](#)

4



DEDUCTION TAB DEFINITIONS	
DEDUCTION HISTORY COLUMNS	DEFINITION
Agency/Unit	State Controller's (SCO) agency/unit code for State Agencies; Agency code for Public Agency or School Employers
Pay PD	Pay Period from which the premium payment was made
Pymnt Start	For a current premium payment, the date when the payment was made. For a payment adjustment, the start date for the adjustment.
Payment End	The anticipated end date for an adjustment payment
Plan Code	Health plan code and party rate
Premium	Premium for the health plan
ER Share	Employer's share of the premium
EE Share	Employee or annuitant's share of the premium
Medicare	State retiree reimbursement for the cost of Medicare Part B
Adj	Contains a "Y" for yes if the payment is a one-time adjustment
ADDITIONAL FIELDS	DEFINITION
Coverage Start:	First day of the coverage period to which this premium payment applies
Coverage End:	Last day of the coverage period to which this premium payment applies
Health Pretax Type:	<b>State Agencies:</b> Type of pretax status: <i>Pre Tax Program</i> , <i>TAP</i> , or <i>FLEX</i>
Pay Entity:	Identifies the system making the premium payment to the health plan
Premium Pymt Mthd:	Payment method, either: <b>Standard</b> , <b>Direct Pay</b> or <b>COBRA</b>

## 5. Employment Tab

The Employment tab displays all employment associated with Membership and/or Health enrollment history. Click on an [Effective Date](#) if multiple transactions are present. Additional information about the selected date appears at the bottom of the screen.

CalPERS - ACES - Microsoft Internet Explorer

[Help Menu] [Screen Help]

[View Participant Information](#) Extract Date/Time: 02/22/2006 05:00 AM

**Participant Inquiry** Print Tab Notes

SSN: 916 - 79 - 5138 Get Data Clear As Of: 02 / 22 / 2006

Name: Will J Wilson Birth Date: 05/06/1970 Gender: Male

Member: Yes Retiree: No Death Date:

HBO Phone:

Subscriber Dependent Enrollment Deduction **Employment** Summary

**Address Information**

4001 Rose Ct  
Garden Grove, CA 92845

**Employment Information and Retirement Enrollment**

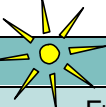
Effective Date	Status	Employer	Coverage Group	Optional	Retirement System	CBU	SCO
<a href="#">12/01/2001</a>	Active	979	74001 Fire W/O SS FULL	No	Public Employees' Retirement	None	None
<a href="#">11/05/2001</a>	Active	979	74001 Fire W/O SS FULL	No	Public Employees' Retirement	None	None

1 of 1

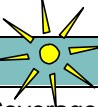
Employer: Garden Grove  
Status: Active  
Status Effective Date: 11/05/2001  
Coverage Group: 74001 Fire W/O SS FULL  
Optional Member: No  
SCO Position Number: None  
Collective Bargaining Unit: None  
Retirement System: Public Employees' Retirement  
Medical Group: 000 ALL EMPLOYEES  
Medical Group Effective Date: 12/01/2001

[Effective Date](#)

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 <b>EMPLOYMENT TAB DEFINITIONS</b>	
FIELD NAME	DEFINITION
Effective Date	Effective date of the selected transaction.
Status	<p>Position Status:</p> <p><b>Active:</b> Participant is currently working in this position or returns after a separation or Leave.</p> <p><b>Educational Leave:</b> (State Employees only) Leave is granted for the purpose of further education.</p> <p><b>Family Leave of Absence:</b> Approved to care for ill/injured family member.</p> <p><b>Industrial Disability Leave</b> (Industrial Disability Leave): Person in a safety classification is placed on leave for a work-related injury or illness. Available to local misc. by contract amendment only.</p> <p><b>JRS Leave of Absence:</b> Select this status only when the Retirement system is JRS1 or JRS2.</p> <p><b>Layoff:</b> Layoff, or in lieu of involuntary transfer.</p> <p><b>Maternity/Paternity Leave of Absence:</b> Leave granted for the purpose of giving birth, and/or caring for a newborn child.</p> <p><b>Military Leave:</b> (Military Leave of Absence): Person is absent from work due to active service with one of the Armed Forces of the United States.</p> <p><b>Non-Industrial Leave of Absence:</b> Person is off work and receiving temporary disability payments for a non-job related injury or illness.</p> <p><b>Permanent Separation:</b> Person separates from employment permanently. This status is required for a person to be eligible to receive a REFUND of CalPERS' contributions.</p> <p><b>Sabbatical Full</b> (Sabbatical Leave - Full Pay): Person is on approved leave, but is still receiving full compensation.</p> <p><b>Sabbatical Part</b> (Sabbatical Leave - Partial Pay): Person is on approved leave, but is receiving partial compensation for time not worked.</p> <p><b>Service Leave of Absence:</b> Person is on an approved leave for the purpose of service with a governmental agency; a university or college; or a nonprofit organization serving a public function.</p> <p><b>Special Leave of Absence:</b> (For State employees only) A "Partial LOA," or "Special Leave for Research or Creative Activity."</p> <p><b>Temporary Separation:</b> Temporarily separated from employment for minimum of two months (a separation less than two months should not be reported to CalPERS) and is expected to return to work.</p> <p><b>To Alternate Retirement Plan:</b> A non-vested member who is subject to a GC 20306 Retirement Plan is working fewer than 20 hours per week, and must switch from CalPERS coverage to the Alternate Retirement Plan.</p> <p><b>Workers' Compensation Leave of Absence:</b> Worker in "miscellaneous" (i.e., non-safety) classification is placed on leave for a work-related injury or illness, and will be/is receiving Workers' Compensation benefits.</p>
Employer	Participant's employer code





EMPLOYMENT TAB DEFINITIONS	
Coverage Group	Five-digit code which is assigned to a group of employees within an agency. It is used to identify, within the employer, groups of members with different benefit packages. The five-digit code is formed by combining a number indicating the type of employer or employment (first digit), coverage groupings (second digit), a second tier or merger indicator (third digit), and a 2-digit sequential number.
Optional	Optional Member - A person (e.g., an elective officer) who has the right to elect membership in CalPERS, and who is excluded from PERS membership unless and until he/she elects membership.
Retirement System	Retirement System - Participant's retirement system: <b>PERS, STRS, JRS, LRS, MRS, or Non-PERS.</b>
CBU	<b>State Employees Only:</b> Abbreviation for the Participant's Collective Bargaining <i>Rank/Unit code</i> . Rank (Collective Bargaining Rank): Participant designation assigned to a State employee. E.g., R = Rank and File, E = Exempt, etc. Unit (Collective Bargaining Unit): unit code assigned to a State employee. E.g., 1 = Administrative, Financial, and Staff Services, etc.
SCO	<b>State Employees Only:</b> State Controller's Office (SCO) Position Number
Employer	Name of the Participant's employer
Status	See definition on previous page
Status Effective Date	Effective date of "Position Status" mentioned on previous page
Coverage Group	Five-digit code which is assigned to a group of employees within an agency. It is used to identify, within the employer, groups of members with different benefit packages. The five-digit code is formed by combining a number indicating the type of employer or employment (first digit), coverage groupings (second digit), a second tier or merger indicator (third digit), and a 2-digit sequential number.
Optional Member	A person (e.g., an elective officer) who has the right to elect membership in CalPERS, and who is excluded from PERS membership unless and until he/she elects membership
SCO Position Number	<b>State Employees Only:</b> State Controller's Office (SCO) Position Number
Collective Bargaining Unit	<b>State Employees Only:</b> Abbreviation for the Participant's Collective Bargaining <i>Rank/Unit code</i> . Rank (Collective Bargaining Rank): Participant designation assigned to a State employee. E.g., R = Rank and File, E = Exempt, etc. Unit (Collective Bargaining Unit): unit code assigned to a State employee. E.g., 1 = Administrative, Financial, and Staff Services, etc.
Retirement System	Participant's retirement system: <b>PERS, STRS, JRS, LRS, MRS, or Non-PERS</b>





EMPLOYMENT TAB DEFINITIONS	
Medical Group	<p>Medical Groups are identified by three-digit codes* that are established differently for each <b>Public Agency or School Employer</b>. If contracting for health benefits by separate recognized employee groups, examples are as follows:</p> <ul style="list-style-type: none"><li>*001 TEACHERS' ASSOCIATION</li><li>002 FIREFIGHTERS' ASSOCIATION</li><li>003 POLICE OFFICERS' ASSOCIATION</li><li>004 MUNICIPAL EMPLOYEES' ASSOCIATION</li></ul> <p>"000 ALL EMPLOYEES" is used when contracting for health as a whole agency there is only one Medical Group for the agency.</p> <p>"999 CONVERSION GROUP" may be selected by the system during conversion.</p> <p>For <b>State</b> employees, the Collective Bargaining Unit derives the Medical Group.</p>
Medical Group Effective Date	The effective date of the medical group

## 6. Summary Tab

The Summary tab will display a summary of the Participant's demographic information as well as participation in various CalPERS programs.

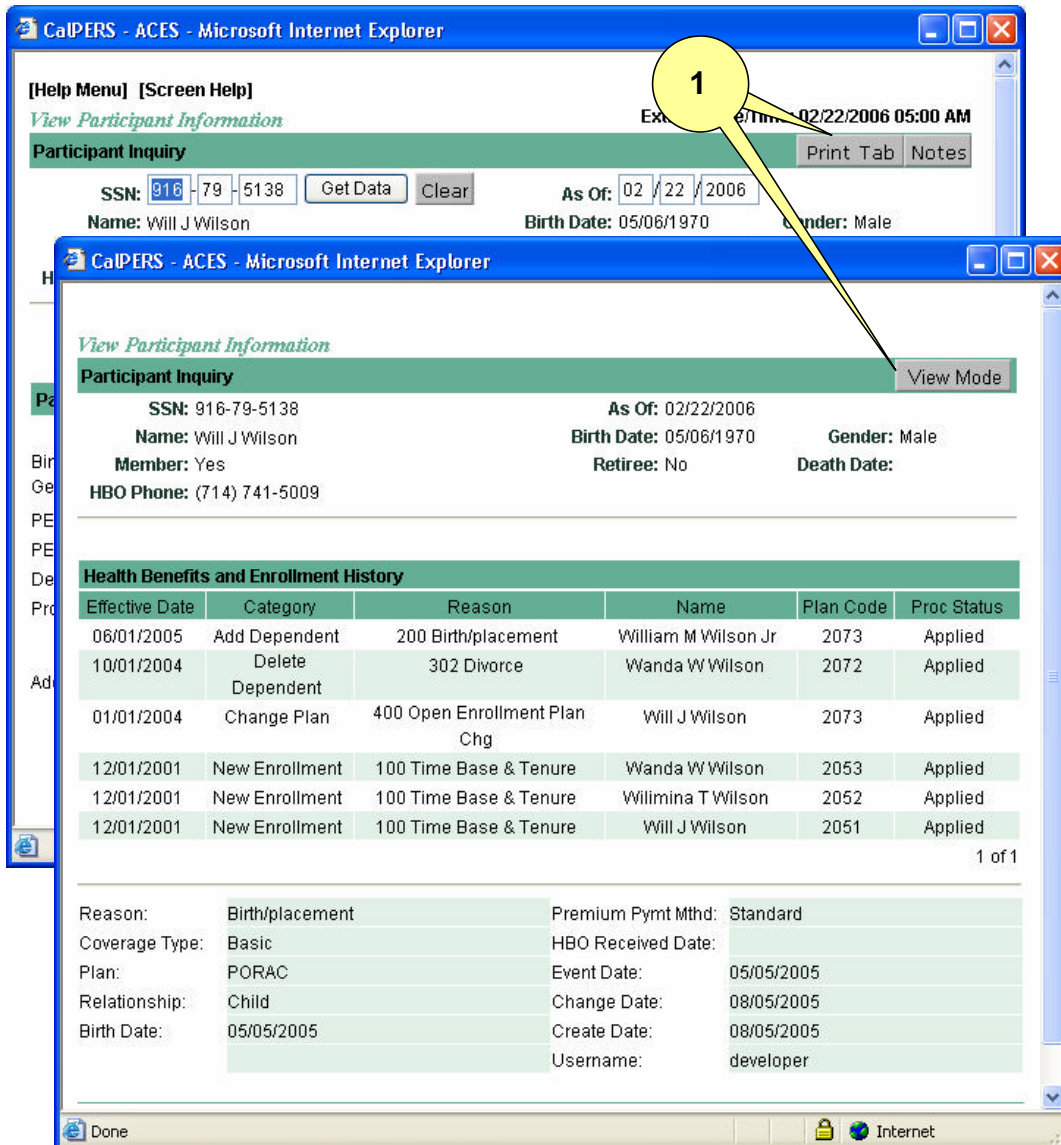
[Help Menu] [Screen Help]  
[View Participant Information](#) Extract Date/Time: 01/02/2003 09:20 AM  
**Participant Inquiry** [Print Tab](#)  
 SSN: 890-01-4003 [Get Data](#) [Clear](#) As Of: 01/03/2003  
 Name: Jane Smith Birth Date: 07/10/1954 Gender: Female  
 Member: Yes Retiree: No Death Date:  
 HBO Phone:  
 Subscriber Dependent Enrollment Deduction Employment **Summary**  
**Participant Summary**  
 Birth Date: 07/10/1954  
 Gender: Female  
 PERS Member: Yes  
 PERS Retiree: No  
 Death Date:  
 Programs: Public Employees' Retmnt Sys  
 Medical  
 Address: 2 Any Road  
 Any City, CA 88888

SUMMARY TAB DEFINITIONS	
PARTICIPANT SUMMARY	DEFINITION
Birth Date:	Participant's date of birth
Gender:	Participant's gender
PERS Member:	Is the Participant a member of CalPERS? Yes or no. <i>NOTE: A Participant who has retired or received a refund of contributions is no longer considered a member of CalPERS.</i>
PERS Retiree:	Is the Participant retired from CalPERS? Yes or No.
Death Date:	If applicable, the death date of Participant
Programs:	Name(s) of CalPERS program with which Participant is associated
Address:	Participant's address

## Printing

At any time, you can print the contents of any Participant Inquiry screen by the following methods:

4. **Individual Tabs:** Each individual tab can be printed by clicking on the tab, then clicking on **Print Tab**. This opens up the tab and formats it for printing. Then press "Ctrl + P" for printing. Click **View Mode** to return to normal viewing mode.



CalPERS - ACES - Microsoft Internet Explorer

[Help Menu] [Screen Help]

View Participant Information

Participant Inquiry

SSN: 916-79-5138 Get Data Clear As Of: 02/22/2006

Name: Will J Wilson Birth Date: 05/06/1970 Gender: Male

Print Tab Notes

CalPERS - ACES - Microsoft Internet Explorer

View Participant Information

Participant Inquiry View Mode

SSN: 916-79-5138 As Of: 02/22/2006

Name: Will J Wilson Birth Date: 05/06/1970 Gender: Male

Member: Yes Retiree: No Death Date:

HBO Phone: (714) 741-5009

**Health Benefits and Enrollment History**

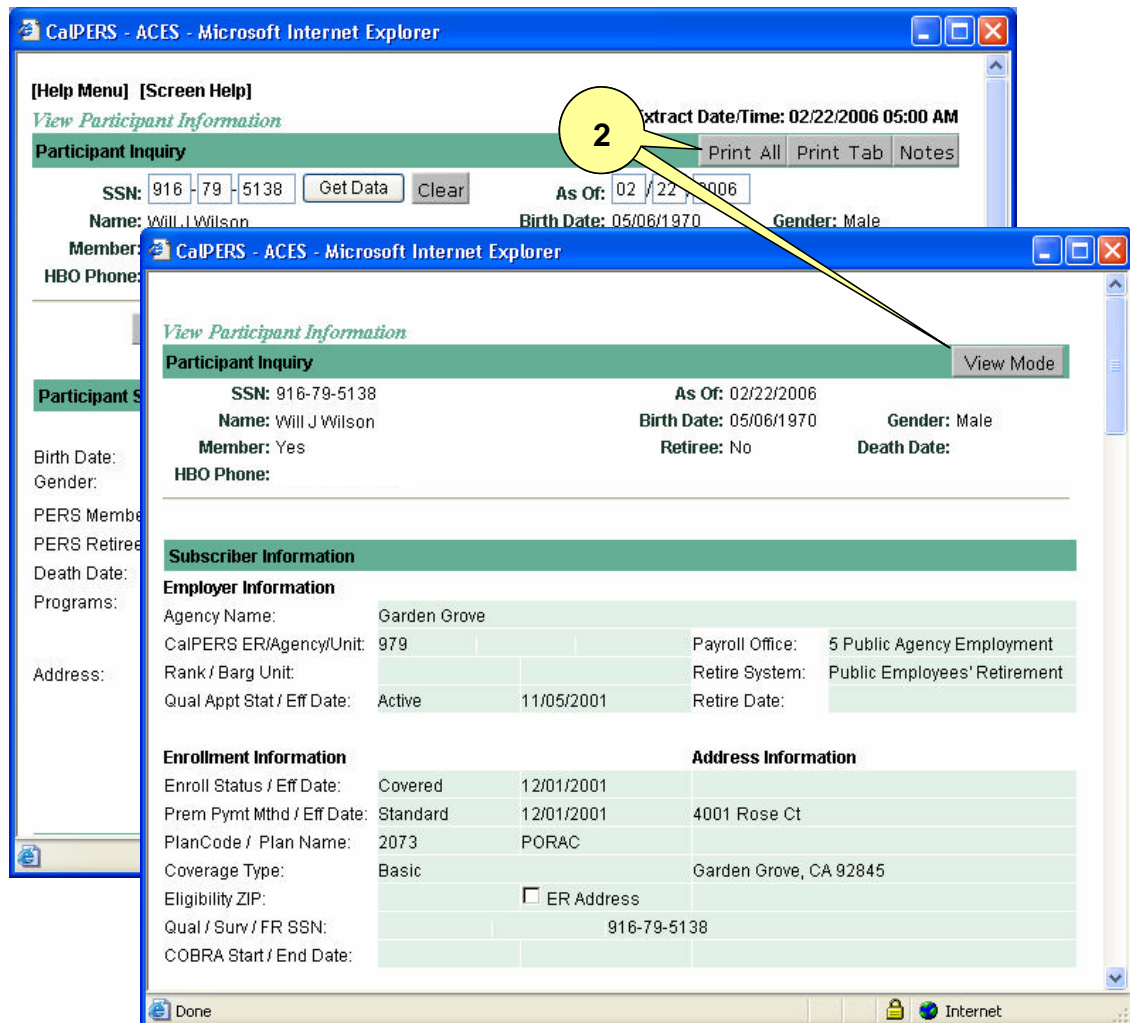
Effective Date	Category	Reason	Name	Plan Code	Proc Status
06/01/2005	Add Dependent	200 Birth/placement	William M Wilson Jr	2073	Applied
10/01/2004	Delete Dependent	302 Divorce	Wanda W Wilson	2072	Applied
01/01/2004	Change Plan	400 Open Enrollment Plan Chg	Will J Wilson	2073	Applied
12/01/2001	New Enrollment	100 Time Base & Tenure	Wanda W Wilson	2053	Applied
12/01/2001	New Enrollment	100 Time Base & Tenure	Willimina T Wilson	2052	Applied
12/01/2001	New Enrollment	100 Time Base & Tenure	Will J Wilson	2051	Applied

1 of 1

Reason:	Birth/placement	Premium Pymt Mthd:	Standard
Coverage Type:	Basic	HBO Received Date:	
Plan:	PORAC	Event Date:	05/05/2005
Relationship:	Child	Change Date:	08/05/2005
Birth Date:	05/05/2005	Create Date:	08/05/2005
		Username:	developer

Done Internet

5. **All Tabs:** In order to print all of the tabs, you must open each of the tabs by clicking on them (in any order). Upon opening the last tab, click **Print All**, then press "Ctrl + P" to print all tab information in a continuous sequence. Click **View Mode** to return to normal viewing mode.



Or, you may press the **Print Screen** key (to the right of the F12 key), then paste the clipboard contents into a document as follows:

- On your desktop task bar, select **Start**
- Select **Programs**
- Select your word processing program (e.g., Microsoft Word)
- Open a new document
- In the Menu Bar at the top of the window, select **Edit**
- Select **Paste** on the Edit Menu (The saved PI screen displays in the new document)
- Select **File** in the Menu Bar at the top of the window
- Select **Print** on the File Menu

**Participant Inquiry System Messages****Access is limited to current agency**

This message will be displayed if the user attempts to access data about a Participant no longer employed by their agency. If the former employer has completed the transaction to move the Participant to a new agency and you are still getting this message, please call **888 CalPERS** (or **888-225-7377**) and ask CalPERS staff to update this transaction.

**Out-of-Use Social Security Number**

If the user enters a Social Security Number that is no longer in use, a message window gives the user the corresponding active number, if there is one. Acknowledge the message, then query for the active number.

**Future Transactions Pending**

This message indicates future health events related to the current Participant

**No employment information with your agency is available for this SSN**

This message will appear for employers who try to access the SSN of a Participant who is not currently employed by their agency.

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